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INDIVIDUAL WORK PROJECT

*Nuno Gama: a Successful Niche Brand
in Portugal?*

Nuno Gama Business Project: New Concept Store Development

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1 BRIEF CONTEXT OF THE BUSINESS PROJECT

THE CLIENT

Nuno Gama is a Portuguese fashion designer, born in Azeitão (Setúbal) in April 1966. Nuno has studied fashion in Oporto, presenting his first collection at the first edition of Moda Lisboa in 1991, under the brand *Nuno Gama Têxtil, Lda*. By 1996, he was a symbol of success in the industry, having his creations being sold in more than 50 stores in both Portugal and abroad, and owing a chain of 9 flagship stores in Portugal.

Despite his huge success, in 1998 Nuno saw a fire destroy great part of his collections in Oporto, where he had his atelier by the time. This was a huge drawback for the designer, forcing him to close all the stores, and representing a loss of 8 years of hard work and dedication. Nevertheless, Nuno didn't give up on his dream and re-established the brand in 2006, offering his customers a greater product assortment including not only clothes, but also shoes, accessories, bags and even jewellery, all exclusively designed for man. In 2012, Nuno opened his flagship store in Príncipe Real, and in 2014 he presented, for the first time, a woman clothing line in the 42nd edition of Moda Lisboa.

CURRENT MARKET OVERVIEW

The Portuguese fashion market has been facing, in the last few years, a decline of apparel sales due to the recent economic crisis (see Appendix A), which had a negative impact on the consumers' purchasing power. In line with this downward trend, men outwear has also experienced a decline in sales (see Appendix B), even if less steep than women's wear, which shows a soaring interest in male fashion and posing an opportunity for the years to come. Despite this decrease in apparel sales in the last few years, the online channel reported a value increase, demonstrating the growing importance of this channel. Another trend to consider in this analysis is the decrease in importance of physical stores, as online shops gain visibility and trust. In order to fight this recent trend, consumers should be offered a memorable shopping experience, so that they value the physical store and visit it more often, thus buying more.

CURRENT CLIENT SITUATION

Nuno Gama operates in the high-end male fashion market, which is composed by both premium and luxury brands. Nuno Gama is a premium brand, given its low international visibility, which makes it difficult for the brand to be considered as a status symbol – an essential characteristic brands must have in order to be considered as luxury.

Very recently Nuno decided to close his flagship store in Príncipe Real (Lisbon), and replace it for a new concept store, which will not only offer his current collection, but also a barbershop and a restaurant/bar, all contributing to enrich the current brand experience. This new store will be larger and more visible than the old one, but also address his customers' needs, providing a more convenient way to shop, but also to perform other tasks such as go to the barber, all in the same place.

THE BUSINESS PROJECT CHALLENGE

In the context of this Business Project, Nuno Gama challenged us to advise him on the development of his own concept store, to be open sometime in May in Príncipe Real. Therefore, the overall project goal was to design a development strategy for the Nuno Gama concept store, by addressing some core research questions related to how can this new store create value for the brand, as well as how can we leverage the value-creation potential of such a store.

SUMMARY OF CONCLUSIONS

During our project we could understand that the development of a concept store can improve brand awareness, interest and image, therefore increasing the likelihood of the purchase. Moreover, we came to the conclusion that two scenarios could be drawn for Nuno Gama brand: "Focus", meaning the brand should keep addressing the same customer base as it does now, or "Expand", which would involve a broader approach to the male fashion market and the deepening of the current brand identity. Nevertheless, and regardless of the scenario, Nuno Gama must engage in brand extension, and more specifically in category extension, in order to improve the brand experience and make his customers visit the store more often and buy more.

2 NUNO GAMA: A SUCCESSFUL NICHE BRAND IN PORTUGAL?

Common wisdom holds that market share drives profitability. But is this idea that accurate? According to the study conducted by Vijay Vishwanath and Jonathan Mark regarding the profitability of premium brands in 40 categories of consumer goods, market share alone doesn't drive profitability. A brand profitability is rather driven by both market share and the nature of the category (if the category is mostly dominated by premium brands or by value and private label brands). If considering a premium category, such as the fashion industry, small brands may also be very successful by focusing on innovation and on a specific niche of the market.

WHAT IS A NICHE BRAND?

A niche is a more narrowly defined customer group seeking a unique combination of benefits or values, which are often untapped by bigger market players. Niche marketing is especially appealing for small companies with limited resources. This way the company can invest its resources in serving a smaller segment of the total market, acquiring a greater knowledge of the consumer needs and achieving a better reputation among the niche. In other words, a niche brand is able to establish a stronger market position by specializing itself on a very specific group of consumers. Another advantage of niche markets is the fact that they will attract less competitors, due to its reduced size. Plus, many times niche customers will be willing to pay a premium price, in order to acquire a product/service that satisfies their needs better. Keeping it short, the objective of a niche player is to be a "big fish in a small pool".

Being a niche brand in fashion market means being recalled by a small number of people, which, nonetheless, have a strong relationship with the brand and tend to buy it. This means that niche brands in the fashion industry are usually characterized by high frequency of purchase, but low penetration. As a matter of fact, many of the well-established luxury brands nowadays have started as niche brands, appealing just to a restricted group of consumers, also because many of them have started as family-owned.

WHAT DOES IT MEAN TO BE A SUCCESSFUL NICHE BRAND?

First of all, it's important to define what a successful niche brand is. Given that these type of brands have a limited scope, its success can't be measured by recurring to the traditional market tools, such as market share or market coverage. Instead, a successful niche brand is defined by enjoying great brand awareness among the target group, rather than regarding the entire marketplace. In other words, a successful niche brand appeals to a very specific target, enjoying a very positive image inside this group.

There's a series of features that seem to be common to all the successful niche brands. Firstly, the high quality products and the fact that they operate in the upper end of the market, meaning that these brands are usually defined as premium and aim at satisfying the needs of a very specific target better than its competitors. Furthermore, successful niche brands tend to sell exclusive products or services, appealing to its target by promoting a level of exclusivity harder to achieve by bigger market players. Furthermore, they also seem to promote a close relationship with customers, which can be a useful tool to get new insights and feedback directly from the buyers, but also to provide customers a more meaningful brand experience.

NUNO GAMA – A SUCCESSFUL NICHE BRAND IN PORTUGAL?

Nuno Gama clearly fits the concept of niche brand explained beforehand, given its limited scope, either in the Portuguese male fashion market, as well as internationally. According to the in-depth interview conducted during the Business Project (See Appendix C), to both customers and experts of the fashion industry, Nuno Gama has a very narrow approach to the male fashion market. Some customers and experts stated very clearly that his clothes had a very good cut, but very specific, since it would only fit men in a very good physical shape. As expectable, it's not so easy to find working men that can afford Nuno Gama's clothes and still have time to go to the gym very often, in order to be able to have a "perfect body", as some customers referred during the interviews. Therefore, it's simple to understand why Nuno Gama can be considered a niche brand, given its small and very specific customer base. Moreover, he also has a very tight distribution network, with his pieces being sold only in his flagship stores across the country, which are still only a few and very limited (since he doesn't offer great quantities of each piece). Of course this has a positive impact on the exclusivity of the brand, as it can become quite

hard to find certain pieces after the collection being presented on the fashion shows. To finalize, another characteristic of the brand that shows its niche approach to the market, is the fact that Nuno puts a lot of effort on establishing close relationships with its customers, which not seldom become friends with the designer. This practice helps to provide a meaningful brand experience, differentiating it from other designers and especially from mainstream premium brands. Plus, customers develop an emotional connection with the brand and start feeling part of the “community”, thus becoming loyal and recommending the brand to friends or family. In other words, and considering the new consumer journey (See Appendix D), Nuno Gama customers are already in the loyalty loop. They don’t consider other brands when shopping, as they don’t think any other brand can offer them the same benefits as Nuno Gama does. Therefore, they are extremely loyal and can even be considered as brand ambassadors, since they have a very strong personal connection with the brand and are proud of buying and wearing it. For them, Nuno Gama offers both substance and status. Substance has more a personal function, since it’s about individual indulgence. In the fashion industry, it’s usually characterized by high quality, good cut and unique design. On the other hand, status (or symbol) has a social function and serves more as a social statement; it confers status to its users since it’s recognised by other people as being a symbol of exclusivity.

Nuno Gama Brand Strength

In order to better understand Nuno Gama’s strength in the consumers’ mind, some brand awareness surveys (see Appendix E) were conducted in downtown Lisbon to 94 respondents, both male (68%) and female (32%), aged between 18 to 56 years old. By analysing the surveys’ results, it could be drawn that Nuno Gama is a quite successful brand. About 73% of the interviewees were able to recognise the brand, or in other words, they were able to identify the brand when exposed to a list of several Portuguese fashion designers. Also, 30% of the interviewees recalled the brand (mentioned it spontaneously) when asked to identify Portuguese fashion designers that they knew at least the name. These levels of awareness are extremely good, having into account that Nuno Gama is a niche brand. Just to provide a better understanding of this outcome, these results were compared to other Portuguese brands, some of them also considered as niche brands (See Appendix F). As it can be seen in the graphic, niche brands usually have a recognition and recall of around 30%, and Nuno Gama scored high above in the brand recognition. When compared to other designers, such as Fátima Lopes, Nuno Baltazar and Miguel

Vieira, only Fátima Lopes has a greater recall than Nuno Gama. Given that, it can be concluded that Nuno Gama is, indeed, a successful niche brand in Portugal.

Advantages of being a Niche Brand

Being a niche brand can have several advantages. In the case of Nuno Gama, it can be considered that he has no direct competitors since his product offering is so specific, and represents a unique concept that other designers or brands simply can't replicate. By serving this very narrow group of "body-conscious" men, which can actually afford to buy his pieces, Nuno guarantees loyalty by building a whole community around his brand, but also frees his brand from the competition of other most well-known high-end fashion brands. Furthermore, by focusing on this narrow group of consumers, that he is in contact all the time, Nuno is able to meet their expectations and satisfy their needs better than anyone. As a consequence, these customers are extremely loyal and don't mind paying a premium price for pieces they consider unique. As mentioned before, they see both status and substance in Nuno Gama's pieces and are great advocates of the brand, promoting it in their inner circles. Also, they see themselves reflected in the brand identity (See Appendix G and H) and are proud of wearing his pieces.

Risks of being a Niche Brand

Despite the numerous advantages of adopting such an approach, being a niche brand also poses some risks. To start with, by focusing on such a narrow target, Nuno Gama becomes extremely dependent on its customers, since the pieces are designed to match their tastes and expectations. Therefore, the brand is more vulnerable than other brands with a more diverse target, and may suffer greatly in case the segment is not satisfied with some collection or if they are affected by some external forces, like an economic crisis.

WHAT SHOULD NUNO GAMA DO DIFFERENTLY?

First of all, it's important to clarify whether Nuno should adopt a different strategy regarding its niche focus. As previously analyzed, Nuno Gama is a good example of a successful niche brand in Portugal. Moreover, this narrow approach is one of the key differentiators when compared with other brands and designers, turning the brand into something unique and highly valued inside its "community". Also, Nuno has limited resources, making it harder to compete with the "big fishes" or achieve a significant

market share in the male fashion industry. Nevertheless, and despite enjoying of great awareness and having a very positive image among its customers, Nuno is not so appreciated outside of this “community”, which makes it risky to try to compete outside of this niche. It’s necessary to invest a considerable quantity of resources in order to build a powerful image and to create positive brand associations, which would increase desire for the brand and make consumers be willing to pay a premium price for it. Thus, it becomes rather risky to drop the niche approach to the market, also because the brand could lose its unique identity.

After understanding that Nuno Gama should continue operating as a niche brand in the national market, it’s important to discuss what could he do differently in order to be more successful. One possible way to approach it, is by looking at the main risks of remaining a niche brand and try to mitigate them. As referred beforehand, the main risk regarding this brand strategy is the lack of diversification, which creates a great dependency on the current loyal customers. Furthermore, and given that Nuno Gama is a premium brand that not everybody can afford, the brand is more exposed if the country faces an economic crisis. This can and probably will have a negative impact on consumers’ purchasing power and might also affect Nuno Gama’s customers, leaving the brand on a very difficult situation. Therefore, Nuno should try to adopt a broader approach to the market, which doesn’t mean stopping being a niche brand. Instead, and since he’s opening his concept store soon, he could sell a greater assortment of products besides his own collection. Said other way, Nuno should engage in brand extension by expanding its brand to other categories besides clothes. Thereby Nuno could use its brand on new products and thus increase sales. This is beneficial for two main reasons. Firstly, by doing so Nuno can offer a broader price range by displaying on the store cheaper items that are affordable to a wider audience. Second of all, it would solve the issue regarding the customers that appreciate and value the brand but that can’t find pieces that fit their bodies in Nuno’s current collection. This type of customers that don’t acquire Nuno’s pieces only because they don’t fit their bodies could, this way, belong to the community by acquiring other products or services and become part of the brand experience. To finish with, engaging in such a brand extension is also a mindful strategy in the sense that it won’t harm the brand’s identity or make it any less exclusive than it is now. Since Nuno Gama’s pieces wouldn’t suffer any change, the loyal customers would still buy and advocate it, while other potential customers could find space to be part of the brand.

Another very important tool for niche brands to thrive are the digital platforms, given the low required investment and the unlimited possibilities they bring along. Digital platforms, such as a website or a Facebook page, are able to reach anyone with Internet access. In addition, nowadays these platforms are no longer considered as a plus or a differentiating factor; they are something that is necessary in order to be in the market. Consumers are becoming more informed and they use the Internet to help them on the decision making process. The decision making process is more complex than in the past, with the ZMOT (Zero Moment of Truth), as now consumers look for information about a product or a brand online, as well as opinions or reviews before they actually go to the store or make a purchase (See Appendix I). Given this, it's absolutely necessary to guarantee that consumers are able to find relevant information about a brand when web-browsing. Of course the same applies to the fashion industry and Nuno Gama. Nonetheless, if a customer searches for Nuno Gama in the Internet, he/she will have a hard time. The information is scarce, besides being badly organized and unclear. First of all, it's important to attend to the fact that at the moment Nuno Gama doesn't have an operational website. By trying to open his website: www.nunogama.pt, the customer will find himself/herself with an empty page, without any type of information. On the other hand, if the customer goes to the brand's Facebook page, the information available is not so abundant and not clearly organized. It's difficult to find information about the brand and the designer, and the page doesn't replicate at all the brand experience. Moreover, there's not a section with the stores in Portugal and the address is not updated, since Nuno has closed his store in Príncipe Real and still didn't open the concept store. Plus, there's no information about the opening of the new store and potential customers might find it extremely unprofessional and create bad associations with the brand. Last, but not least, the page is only available in Portuguese, even if the designer also has a lot of foreign customers. All in all, Nuno Gama lacks a well-structured website and a well-designed Facebook page. Even if this might negatively affect the image of the brand with its loyal group of customers, the worst problem is the idea that it might create in potential customers that would be interested in the brand, but find themselves in a poorly organized Facebook page and an inexistent website. Needless to say, this is a pitfall of the brand that must be addressed as fast as possible; otherwise Nuno can jeopardize years of hard work, as consumers nowadays demand information and require a consistent and solid brand experience, which also involves the online platforms. Nuno Gama must build a new website aligned with the brand and redesign his Facebook page, as soon as possible.

3 REFLECTION OF LEARNING

PREVIOUS KNOWLEDGE

In general, the Business Project was a great opportunity to apply many of the concepts and frameworks I've been studying during the past two years in my **Master in Management**, while helping me to understand the applicability and adaptability of academic knowledge into the corporate world.

Master Content Applied

Throughout the development of this Business Project with Nuno Gama, I've found that several Marketing-related courses I've taken during my master degree at Nova were extremely useful, as it's the case of *Sales Force Management & Retailing*, *Consumer Behaviour* and *Marketing Planning*. Regarding SFMR, me and my group have used some theoretical frameworks to help us elaborating the strategies for the brand, as it was the case of the New Consumer Journey framework, which was the base of our analysis and helped us defining different consumer groups (inside the Loyalty Loop and outside of it). Both Consumer Behaviour and Marketing Planning were a valuable help to understand basic concepts we have used thorough the project, as it was the case of Niche Brands.

NEW KNOWLEDGE

Regarding the new knowledge applied, I believe that Professor Catherine's help and guidance was extremely valuable, with its vast background on luxury goods and markets, her insights on the fashion industry, but also her deep knowledge on *Brand Management*. I had the opportunity to take this course at the same time I was doing the Business Project and it was a great experience. Many of the concepts I've learnt were very useful in the development of this project, as it's the case of Brand Analysis (including Brand Identity and Awareness theoretical models), how to construct a good questionnaire to measure brand awareness or how to structure an in-depth interview. All these tools composed the basis of our project. Moreover, me and my group have also adapted some luxury models to fit the reality of Nuno Gama.

PERSONAL EXPERIENCE

Key Strengths and Weaknesses

During this Business Project, but also my academic life, I was able to start understanding that some of my key strengths as a group worker is the fact that I'm a very accessible and positive person. I'm very social and open-minded so it's easy to work with me. Plus, I'm usually able to motivate and engage other team mates with my constant good mood. Finally, I'm also good at dealing with stressful situations and I always try to calm down the people around, by encouraging them to think positive.

On the other hand, I was able to notice some of my weaknesses as well. I believe that my main weakness is also closely related with my strengths. Since I'm very friendly sometimes I have a hard time imposing myself and defending my ideas if I'm not 100% sure about them. Also, since I'm so friendly sometimes I feel that other people don't take my opinions as serious as they should.

Self-improvement Plan

My self-improvement plan should mainly be focused on my weaknesses, since my strengths come out naturally, since they are very much part of my personality. Regarding my weaknesses I must be more confident about my skills, so that others feel it and do as well. I've noticed that when in informal situations I defend my positions and ideas, since I truly believe in them. I must learn how to transmit that passion and confidence into the corporate world, by leaving my friendly side aside when it's necessary to be tough and stand up for my ideas. Then I believe others will take me more seriously.

BENEFIT OF HINDSIGHT

In my opinion for this project it was of great value the big diversity within our group, with people with distinct backgrounds and strengths. This was very important since we had different visions and opinions on the different areas. Nonetheless, sometimes this also made it more difficult to reach a consensus or work together, as not everyone had the same working habits.

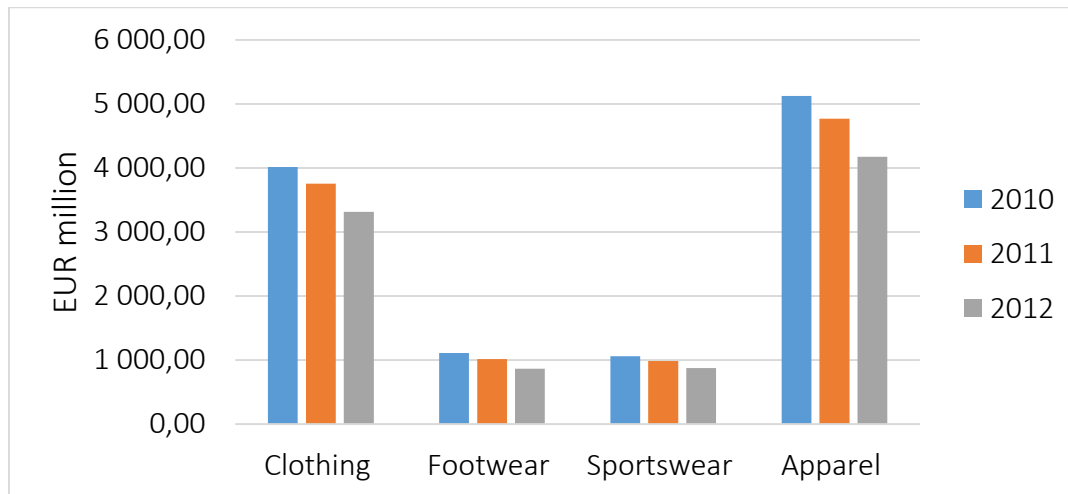
In what concerns what should have been done differently, I believe that the main pitfall of our project was the lack of interaction with our business advisor. I believe that with a closer collaboration it would have been easier to develop this project.

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5 APPENDIXES

A. Sales of Apparel by Category: Value (2010-2012)



B. Sales of Men's Outerwear (EUR million)

| Category | 2010 | 2011 | 2012 |
|---------------------------|----------|----------|----------|
| Men's Jeans | 153 | 146.9 | 136.4 |
| Men's Jackets and Coats | 162 | 155.3 | 143.2 |
| Men's Jumpers | 196.9 | 186.8 | 168.7 |
| Men's Shirts | 279.2 | 261.3 | 229.6 |
| Men's Shorts and Trousers | 206.1 | 195.1 | 175.5 |
| Men's Suits | 108.1 | 102.2 | 91.7 |
| Men's Tops | 194.8 | 179 | 151.7 |
| Other Men's Outerwear | 15.7 | 14.4 | 12.2 |
| Men's Outerwear | 1,315.80 | 1,241.00 | 1,109.00 |

C. In-depth interviews guide

Warm-up: My name is [name of interviewer] and I am part of a group of Nova SBE master students conducting a research project about men's fashion in Portugal and the Nuno Gama brand in particular. First of all, thank you very much for helping us by taking this interview. Our talk will last between an expect 45 minutes to one hour. After one initial question I will introduce in some moments, you will be free to tell me whatever thoughts and experiences come to your mind on the subject. Please remember that there are no right or wrong answers. I hope you don't mind if I record our conversation for the purpose of analysing it later. This will be an anonymous interview and you will not be contacted after this session.

Topics for the Interviews with Consumers:

1. Fashion Consumption behaviour
 - Attitudes and behaviours towards fashion
 - Relation with brands and designers
 - Shopping patterns
2. Getting in touch with Nuno Gama
 - Communicating with the brand
 - First Nuno Gama purchase
3. Purchasing Nuno Gama
 - Nuno Gama purchasing habits
 - Act of buying Nuno Gama
 - Favourite Nuno Gama pieces
4. Wearing Nuno Gama
 - Purpose of Nuno Gama clothing
 - Feelings towards wearing Nuno Gama
 - Occasions for wearing Nuno Gama

5. The culture of Nuno Gama

- Characteristics of the brand
- Differentiating aspects of the brand
- Relation to Portuguese culture

6. Concept Store

- Opinion about the initial concept store plan
- Outlook on possible relation with the concept

7. Demographics

- Gender
- Age
- Occupation
- Level of education

Topics for the Interviews with Experts:

1. Portuguese fashion industry

- The Portuguese consumer
- Opinion about the industry
- Coming trends and opportunities

2. Portuguese men's fashion

- The Portuguese male consumer
- Coming trends and opportunities in men's fashion

3. Relation to Nuno Gama

- Getting to know Nuno Gama
- Personal relationship with Nuno Gama

4. Nuno Gama as a designer

- Presence in the fashion world
- Creative and artistic persona

- Opinion about Nuno Gama's work
- Previous collections

5. Nuno Gama as a brand

- Characteristics of the brand
- Differentiating aspects of the brand
- Relation to Portuguese culture
- Nuno Gama consumers

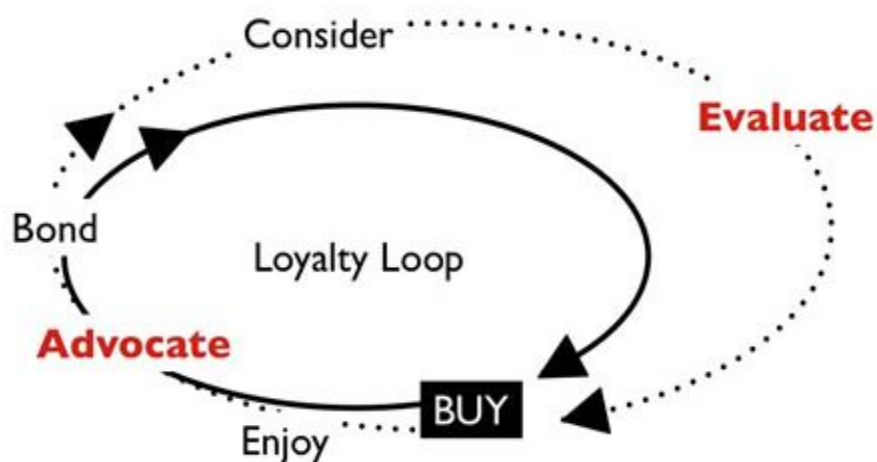
6. Concept Store

- Opinion about the initial concept store plan
- Outlook on possible relation with the concept
- Opportunities for concept store development

7. Demographics

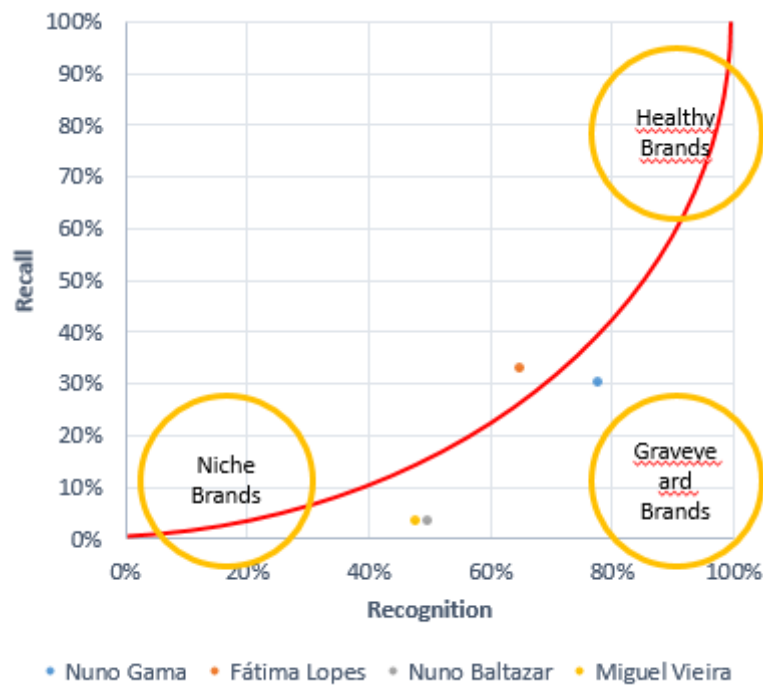
- Gender
- Age
- Occupation
- Level of education

D. The New Consumer Journey

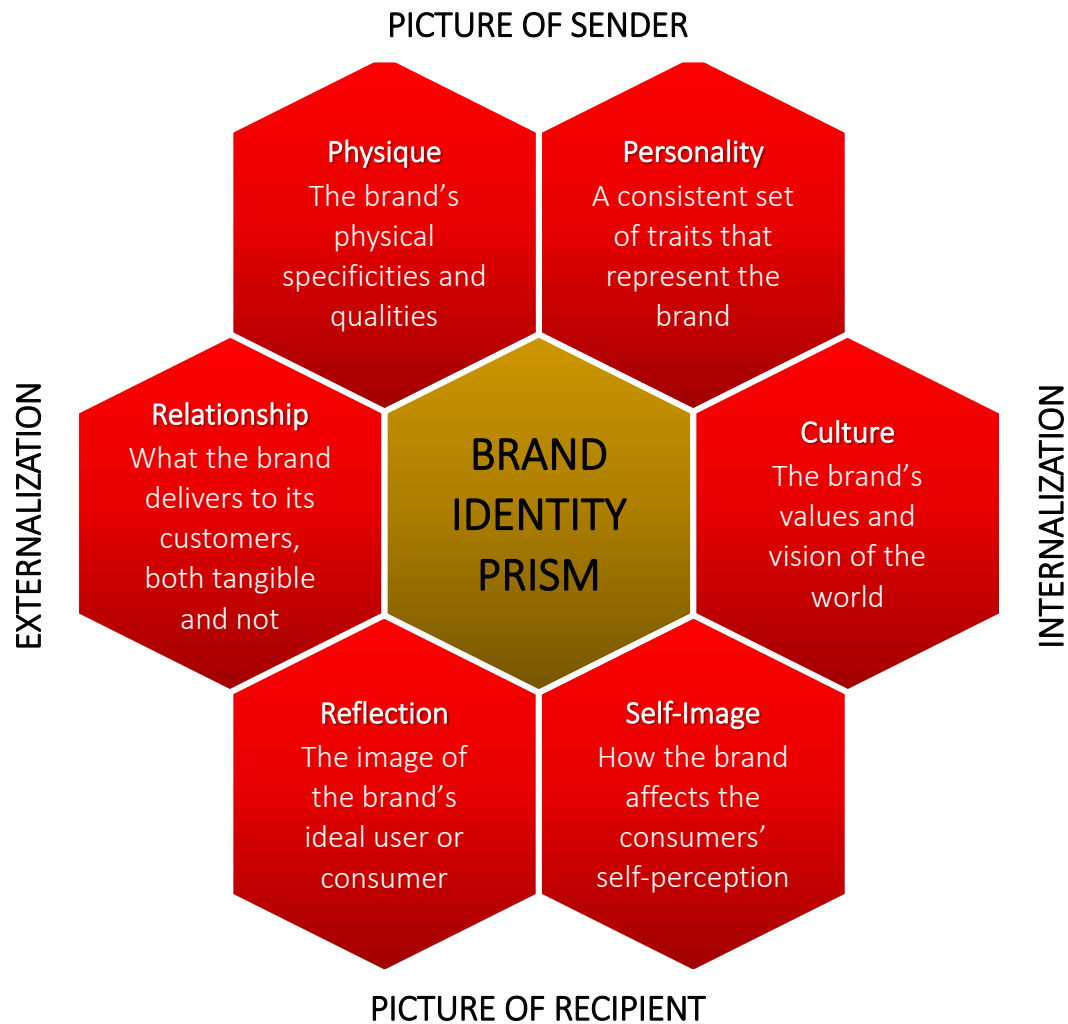


E. Brand Awareness Questionnaire

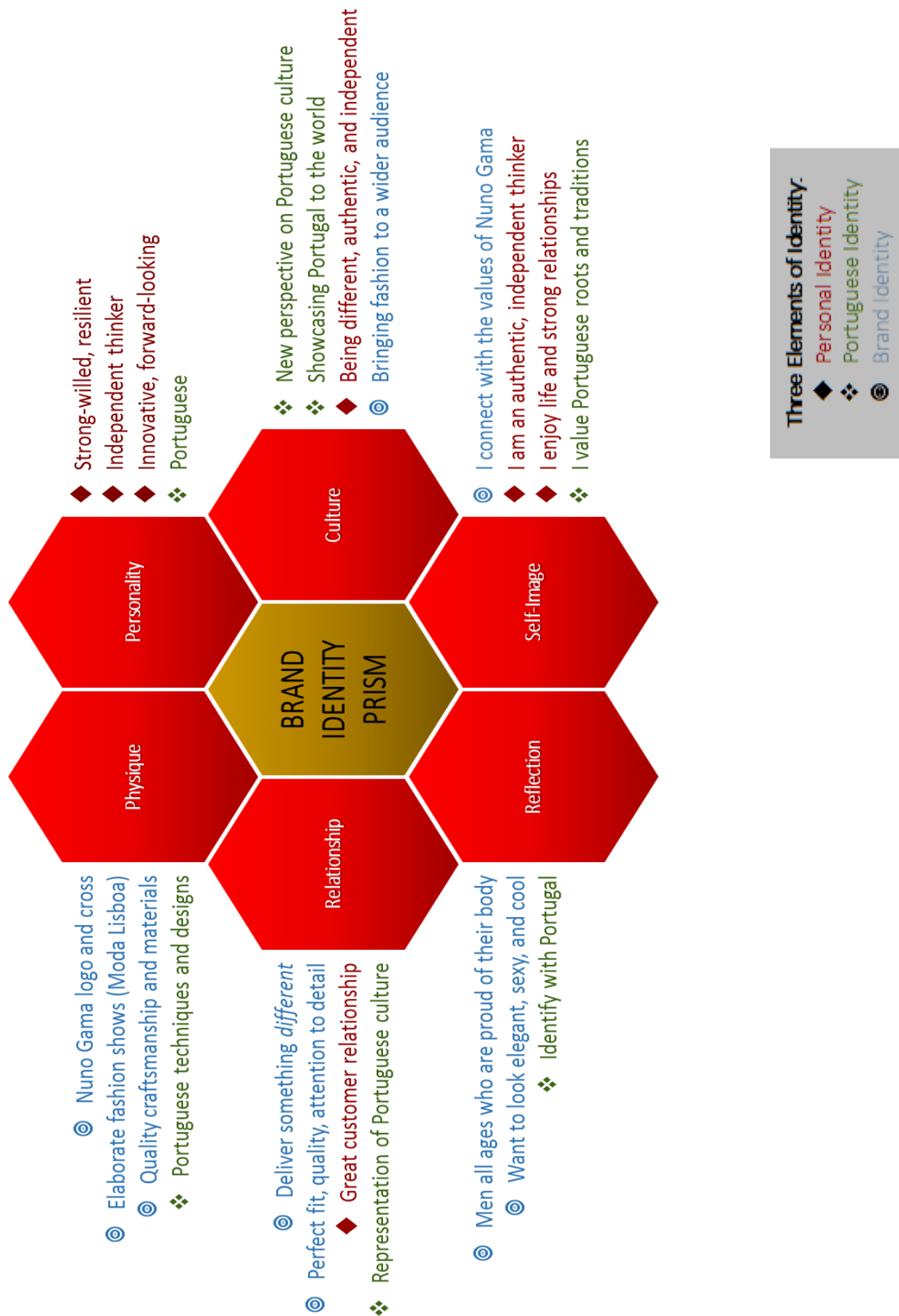
- 1. Please identify some fashion designers you know at least the name.**
- 2. Please identify some Portuguese fashion designers you know at least the name.**
- 3. From the list below, which fashion designers do you know at least the name?** (Ana Salazar, Nuno Baltazar, Luís Buchinho, Lara Torres, Felipe Oliveira Baptista, Nuno Gama, Dino Alve, Fátima Lopes, José António Tenente, Miguel Vieira, Alexandra Moura, Maria Gambina)
(If the respondent recognises Nuno Gama)
- 4. How did you come to know Nuno Gama?**
- 5. Did you buy at least one piece of Nuno Gama clothing or accessories in the past year?** (Yes, No)
(If the respondent answered “yes” to Question 5.)
- 6. What product did you buy and when did you buy it?**
- 7. What product did you buy and when did you buy it?**
- 8. Have you ever bought any other pieces from Nuno Gama?** (Yes, No)
- 9. Please specify your gender.** (Male, Female)
- 10. Please specify your age.**
- 11. What is your occupation?**
- 12. What is your level of education?** (Primary, Basic 2nd Cycle, Basic 3rd Cycle, Secondary, Technical Education, Bachelor, Postgraduate, Master, Doctoral)
- 13. Where do you usually reside?**

F. Relation between Recognition and Recall

G. Kapferer's Brand Identity Prism (theoretical model)



H. Kapferer's Brand Identity Prism applied to Nuno Gama



H. ZMOT (Zero Moment of Truth)